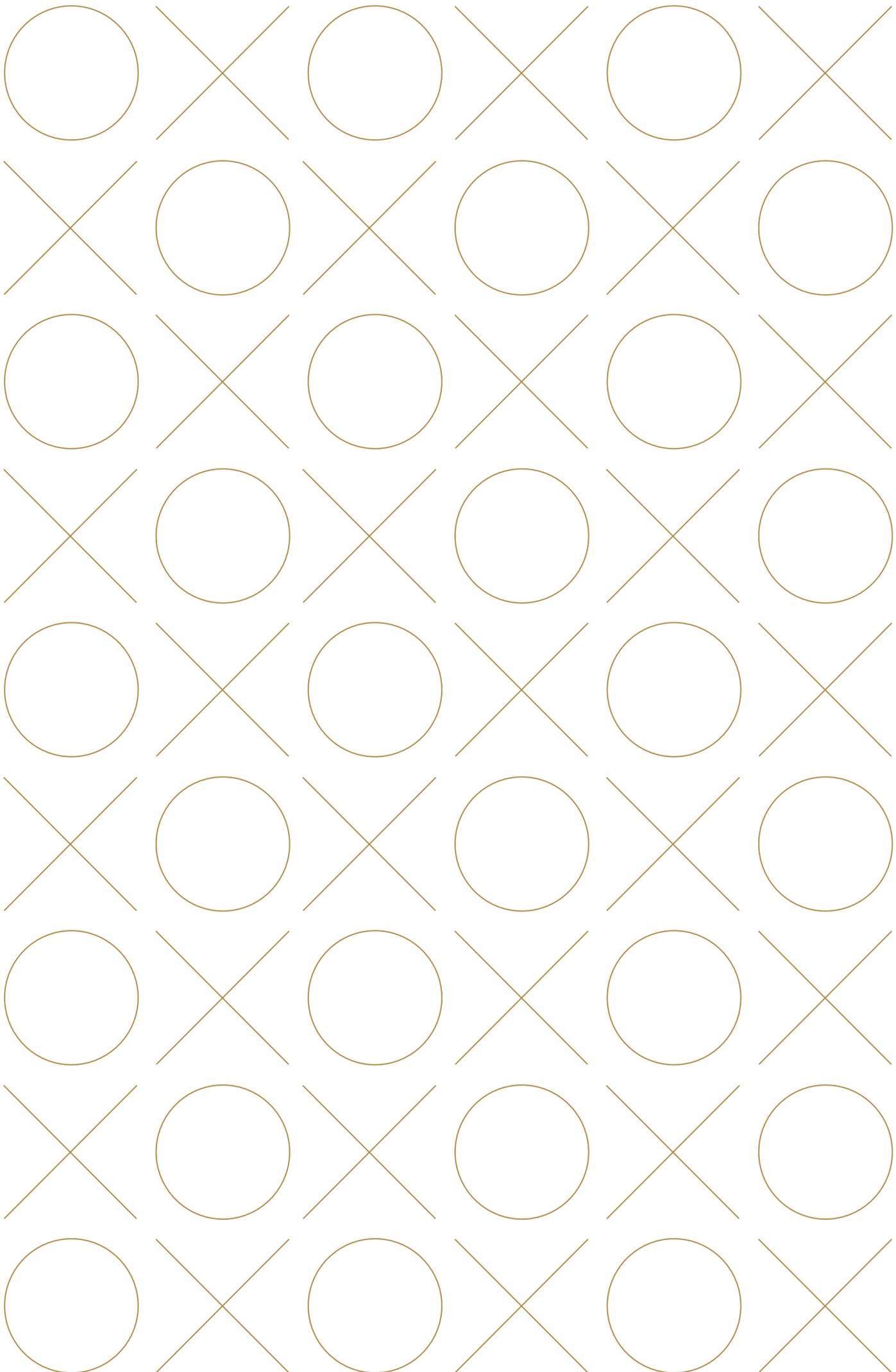


# Relate

by zendesk



Relate is home to a diverse selection of expert content and deep thoughts from Zendesk.



# It wasn't long ago

that we thought of ourselves as being in the call center business. From call centers to contact centers, from customer service to customer experience—our industry has evolved. But the thing is, we were *never* just in the call center business; we've always been in the people business—the relationship business. Now more than ever, the relationships we have with our customers, our competitors, our internal peer departments, our employees, and our leadership matter. What we do *really* matters.

At Relate by Zendesk, we understand that relationships are everything. That relationships are complicated. That relationships drive the success of our businesses. Because at the root of every purchase, transaction, and interaction, is a relationship. And so, we at Relate are here to help you un-complicate all your important relationships (except your romantic ones, those are on you).

Welcome to Relate! Join us online, at our events, and in the community—chances are we'll soon become one of your favorite, most uncomplicated relationships.

Here's to better relationships,

Sarah Stealey Reed

Editor of Relate  
@stealeyreed



## Four simple tips to get started

Here are Klebahn's simple tips to get started with the game changers of customer service—empathy and humanistic design:

### 1. “Empower front-line folks to ask ‘why?’ when they talk to customers.”

In the rush of daily life and the constant flood of customer requests, it might seem silly to sit down and have a deep conversation with a screaming caller. But it will pay off if you discover that their problem is something you can solve for every customer going forward.

### 2. Senior leaders should spend a day working as a customer service rep.

“They can build rapport and stop thinking of the customer as a number or market data,” he said. As a former leader at Timbuk2 and Patagonia, Klebahn used to put this into practice himself. “It was incredibly humbling and provided incredible focus on the big issues.”

### 3. Ask all sorts of big questions.

Don't only ask why the dress didn't fit the customer—ask what they would want it to fit like, in an ideal world. Ask what activities they would like to do while wearing that romper. You might be surprised by what you learn about customers when you give them the forum to really talk.

### 4. Set up a systematic way for company leaders and other departments to gather and review customer service surveys.

“Our customers can show us so much more about what's going in the world if we just listen,” Klebahn says. “How do we make sure customer service people are heard in the company and the information goes someplace?”

## Humanistic design is a service game changer

REBECCA HUVAL

Airports are a petri dish for the worst customer service blunders. After waiting for an hour in security, nearly missing your flight, and forgoing lunch in the terminal, you finally board your plane. Breathing a sigh of relief, you think you've gone through all the hoops and hassles. Not so fast.

The flight attendant makes you check your luggage, even though it contains a precious laptop—and you have a layover tighter than the angry lump in your throat. You might think you're livid simply because there wasn't space in the overhead bin. But you'd be slightly off.

In a collaborative study between JetBlue and Stanford's d.school, Institute of Design, students and researchers interviewed passengers—following them from curbside check-in all the way to their flights. They asked open-ended questions, and received surprising responses, according to Perry Klebahn, the director of executive education at the d.school. The passengers interviewed were happy when there was space for their bag on the plane, of course. But they were also satisfied with their experience when they knew beforehand that they would have to check their luggage. The unsatisfied customers were those who didn't know ahead of time whether there was space for their stuff. “It's really the uncomfotableness of not knowing,” Klebahn said.

That's the difference between empathic customer service in theory and in practice—and why customer service reps should take a crash course in humanistic design. Sure, a flight attendant might sympathize with a passenger and assume that they're upset by the lack of space in the overhead compartment. They may even offhandedly ask the flyer about how they're feeling. But a customer experience with human-centered design at its core wouldn't stop at just one person asking a question. It would have purposeful and open-ended questions asked every step of the way. It would use that data to proactively improve the passenger's journey, solving the issue at its root. After all, customer service should be about more than dealing with angry people. It should prevent them from becoming angry in the first place.

“Customer service is an easy place to apply design

thinking,” Klebahn said. “You can aggregate customer feedback really quickly. Ask some open-ended questions and explore, rather than simply responding to a request.”

### The magic of empathetic modeling

Human-centered design can not only improve product development and consumer pathways, it can optimize the way customer service reps manage flare-ups when they do happen. That's why Joyce Thomas—an industrial design professor at the University of Illinois at Champaign-Urbana—advocates for empathic modeling.

“Whenever you're in the height of a confrontation, it's hard to step back, pull yourself out of it, and see what it is you can learn from it,” Thomas said. “That's why empathic modeling is so important. It helps you develop a muscle memory of what that experience is like.”

The magic sauce is fairly simple: Role play. Force yourself to step outside of your own perspective by literally acting like someone else. Thomas asks her students and business consultees to put on sunglasses smothered with vaseline—further obstructed with paper blinders attached to the sides. “I call them empathy goggles,” Thomas said. “Suddenly, you are in someone else's shoes completely. If you're a business person, it is a method that makes you realize: You think you know where everything is, but you can't see everything.”

Thomas offers some empathic modeling takeaways for customer service reps:

**Takeaway 1:** Follow each step it takes for a customer to reach you. Customer service reps should intimately understand how the phone tree or interface works. How many buttons does an angry customer have to press before they finally get to you? Don't just know the answer, but do it yourself, repeatedly. “They need to have an end user's perspective so they can see what they're feeling and what emotions they went through in that timeframe,” Thomas said.

**Takeaway 2:** Simulate your customers' problems. If you often get callers with the same issue—like breaking the product when they open the awkward packaging—try mimicking the same issue. Literally, open the package until it malfunctions. Put yourself in the emotional mind space of someone who is so excited to try out a new toy, only to feel

heartbroken and a bit foolish and clumsy. Imagine their embarrassment and disappointment. Now, try following your company's phone tree through to customer service. “Empathic modeling is all about understanding that journey,” she said.

**Takeaway 3:** If you can't set up a physical simulation, try simple storytelling. Give your customer service team a list of personal backstories for callers. For example, imagine that the caller just found out that a loved one was in a car accident. A few hours later, they're calling you. Although empathic modeling is usually about physically experiencing someone else's situation, you won't be able to simulate some of your callers' deeper issues without a bit of imagination.

### Skepticism and surprise

For anyone skeptical of these goofy exercises, you aren't alone. When Thomas put her empathy goggles on a crowd of doctors at a conference in Malaysia, she was nervous that they might not learn much. Her audience was extremely educated, tough, and accustomed to empathizing with their patients. But just before the doctors started walking with limited vision, Thomas was surprised. “It was really interesting to hear them say: ‘I'm really nervous about it, my stomach hurts,’ or ‘I'm excited, but scared.’” They held hands with other doctors or walked with one arm on another physician's shoulder.

“It caused them to want to connect with another person,” she remembered. “That's the whole point of empathic modeling: You could be very blasé, thinking it's going to be a piece of cake. Then, you might have unexpected journeys or frustrations.”

Ultimately, those surprises make for better business. “You begin to share that person's angst and journey and view the situation more holistically,” she said. “You find solutions you can't when you're only invested in your own experience.”

Rebecca Huval writes about design and the many ways it intersects with our world, including tech, food and culture. Her bylines have appeared in publications such as the Awl, GOOD and Communication Arts, where she served as managing editor.

# Measure your networking results in adventures, not inches

SARAH REED *and* DAYNA STEELE

The foyer is claustrophobically stuffed with people. We're all customer experience professionals; I don't recognize anyone smashed against me.

My company has been recently acquired and this is the night before our big event—part user conference, part company celebration after an exhausting few months of layoffs and uncertainty. The small space is charged—nervous, excited, and ready. At this point, though, we're mostly ready for the doors of our dinner venue to open and reward us for our patience.

Abruptly, the tiny woman to my left starts talking—loudly and not necessarily to anyone in particular. “We should make a break for it. I can slip through that opening over there and we can make it to the bar. It's time for wine.” With nary a hesitation, I take the bait.

Over dinner we introduce each other to colleagues in the room, chat about life, love, and customer service, and make frequent dashes to the bar when the waitress is unable to keep up with our wine consumption. I am smitten with her wit, wisdom, and zealousness. We end the night with hugs and a promise to stay in touch.

The next morning I break into a wide and surprised grin as the keynote speaker bounces up on stage. There she is, Dayna Steele, my newfound friend.

**Dayna Steele:** I had two thoughts when I met the whirlwind Sarah: this was either going to end up as a great friendship, or one of us would need bail money. You can't help but be sucked into Sarah's orbit when she is around. She's the kind of people I gravitate to at any event whether it's a business conference or a family wedding.

Growing your network is not about attending as many networking events as you can and handing out business cards. It's about meeting people, starting conversations, and creating real relationships. That's how a successful network grows.

It's important that you have the essentials of good networking in place because you never know when you are about to add someone to your network—it can happen anywhere and anytime. What are those essentials?

- An open mind
- Curiosity
- A genuine smile
- A good laugh
- Knowledge of the world around you, and
- The ability to get to know someone and talk about them. Not you.

**Sarah:** As customer experience professionals, we tend to measure everything, including the success of our relationships. So how do you know if the network you've built is successful? How do you know if the effort is worth it? “Nobody gets paid for networking,” says motivational speaker and networking expert Rob Brown. “We all get paid on the results of our networking.”

Sometimes the results are immediately apparent. Towards the end of Dayna's dynamic keynote that morning, she careened above the crowd and asked, “Where is my new friend, Sarah?” As I stood amongst hundreds of my professional peers and new colleagues (and bosses), she unsolicitedly exalted my expertise. “You should get to know Sarah. She knows some things about successful customer service.”

I have never forgotten that moment. I have never forgotten how humble and appreciative I felt. Sometimes the results of your network immediately scream their worth.

But let's be honest, that's not always the case.

**Dayna:** I've learned a lesson over many years in many different careers: the more I do to help others be successful, the more adventures I have, the more opportunities come my way, and the more successful

I become. I genuinely enjoy putting people together and watching what networking magic can happen when I step away.

As a business success speaker, I often draw on stories from working with the world's greatest rock stars. Every year the Houston station I worked for would put on a charity rock auction and concert. Many different rock stars would help as celebrity auctioneers and then jam together at the end of the event. Prepping for one of those jam sessions was Jack Blades (Night Ranger), Tommy Shaw (Styx), and Ted Nugent—this was a great networking opportunity for them. Calling themselves “Those Damn Night Sticks” they played well together that one night. So much so, they became Damn Yankees and went on to have several radio hits.

I didn't expect a lifelong friendship and countless work opportunities to come from my first conversation with Sarah. I just knew she was fun to sit with, had a great laugh and smile, was intelligent, and neither of us could get enough of the other's stories or wine. I took time to know

her that night and now my network continues to grow. The “inches” nod in the title of this post? Sarah is well over six feet tall in heels. I am barely five feet in cowboy boots. Despite the fact I need to stand on a chair to talk to her, we found mutual ground and powerful networking results, in partnership and friendship.

**Sarah:** Your network shouldn't just be measured in inches—networking results are more than

just a number. It's not as simple as assigning each person a rating: “I got three speaking engagements from Mary and an introduction to a CEO. I deem her a 5. Jayne only invited me to that event in Vegas and those conferences we spoke at didn't yield much. She is a 2. Jayne has to go.”

In *Your Network Is Your Net Worth*, Porter Gale says good networking is more than personal brand building or getting something from other people. It's more about: “Am I forming relationships that are based on my own passions and beliefs?” and “Am I creating relationships with people that I trust, like, and respect?”

It's more about: “Am I forming relationships that are based on my own passions and beliefs?” and “Am I creating relationships with people that I trust, like, and respect?”

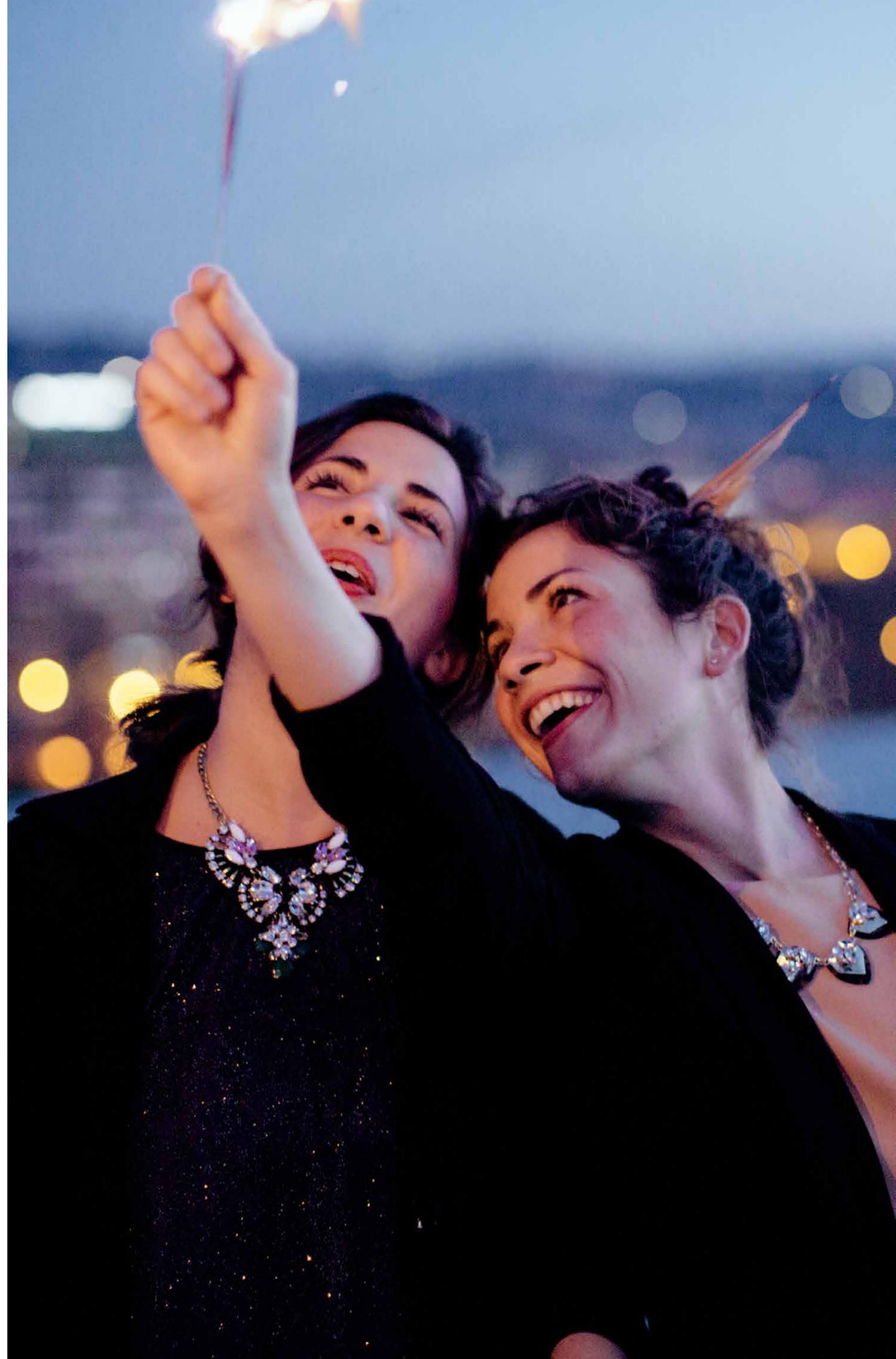
Yes, your passions and purpose matter. Time matters. Respect matters. Rather than a black and white number, consider the experiences you've shared, the dinners you've had, the emails you've sent on their behalf, the job recommendation, the LinkedIn reviews, the charity they introduced you to, the wine you drank, the astronaut you met, the fun you had co-authoring a story—that's how you measure your network.

Dayna and I never talked about networking that first night at dinner. Neither of us said, “I think I can get something important out of you. Give me your card.” Instead, we immediately realized a mutual passion for a cause (good customer service) and a shared personal appreciation for great husbands, quirky cities, and fine wine. We liked each other and what the other stood for—the numerous adventures together, and because of one another, delightfully and easily came later.

**Catch Dayna on Wednesday 10/26 at the Relate by Zendesk booth (#900) at 11:00am. On Thursday, Sarah and Dayna will be on stage together again for the closing keynote at 4:15pm.**

Sarah Stealey Reed is the editor of *Relate by Zendesk*. When she's not wandering the world, she's a loud writer of customer experiences, contact centers, and optimistic relationships. Find her on Twitter: @stealeyreed.

Author and rock radio Hall of Famer Dayna Steele is the host of *The Rock Business* video series and is *The Rock Talk* featured keynote business speaker. Find her on Twitter: @daynasteele.

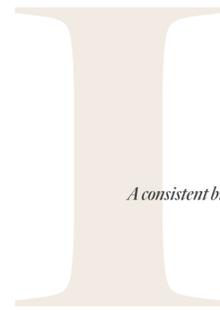


# Keep brand voice consistent in customer support

CHELSEA LARSSON

Imagine driving down the highway, checking the mile markers, when all of the sudden the signs change from miles to inches. What would your first reaction be? Confusion? Concern? Frustration, definitely. Anxiety as well when you realize there's a new knowledge needed to translate the distances. No question, it would be a bad experience.

As customers, we experience this confusion everyday when companies don't use their brand voice in customer service.



*A consistent brand voice:*

## Improves the customer experience

Too often customer service content—help center articles, forums, FAQs—is written with no regard to the customer experience. The brand voice shifts from what customers know to something new, dry, and technical. The sense of familiarity is gone. This puts customers on edge at a time when they are already stressed out.



## Builds brand trust

Just like in personal relationships, consistency of character builds trust over time. Your brand identity gets muddled if your brand speaks one way in advertisements and another way on the blog and yet another way in customer service.



## Helps the customer navigate and digest information

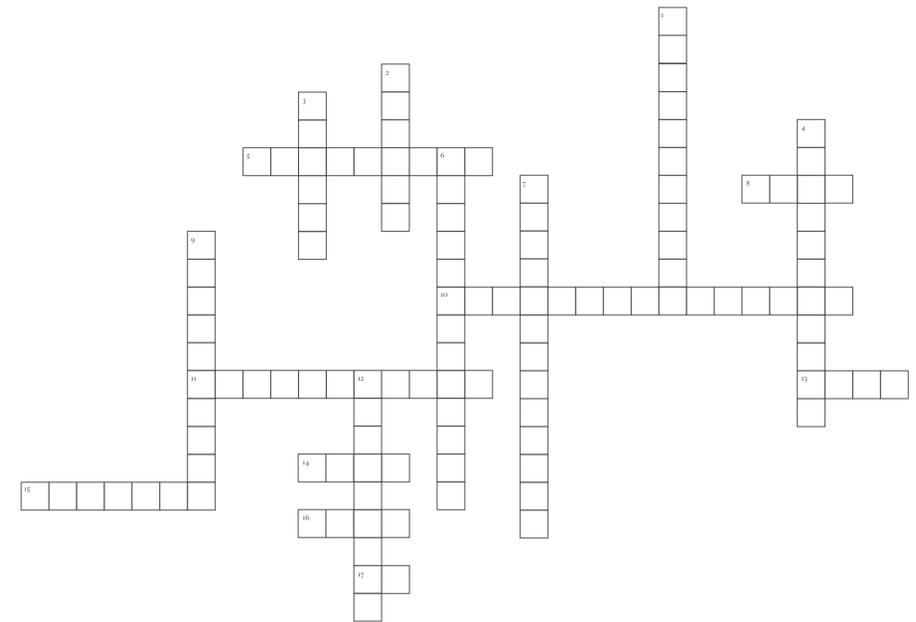
Customers are already familiar with your tone of voice. They know when to read a whole page of text vs. when something needs an action: "Click here now!" Using a consistent brand voice enables you to lead customers to certain actions and behaviors.



## Increases opportunities for more customer interactions

If all customer service channels feel consistent (and comfortable) then customers will more likely explore multiple touch points. Aim for a seamless brand voice from chat to social to self-service.

# Relationships are Complicated



## DOWN

1. Future customers (opposite of baby boomers)
2. Those teammates who are far away
3. A tool to hear the voice of the customer
4. When customers find their own help
6. A place for customer conversations
7. Are complicated
9. To give freely
12. Big data, reporting, metrics

## ACROSS

5. The amazing people who make up your team
8. Who you gonna
10. Helping the people who use your products
11. The most hated channel buzzword in retail customer service
13. The mother of all customer service metrics
14. Relate's favorite color
15. Walking in someone else's shoes
16. Half of your call center staff in 2050
17. An acronym for customer experience

Tweet us @joinrelate for the answers.

# Fair Weather Report



## Monday

Lightning in the morning—be careful about how you conduct yourself.



## Tuesday

A heavy buildup of conversations will hit your contact center.



## Wednesday

Your relationships look radiant today as your friends call you a beam of sunshine.



## Thursday

Bots are on the horizon. Wear a sweater.



## Friday

Warm showers and a few inches in the evening.



Find many more thought-provoking articles and insights online at [relate.zendesk.com](http://relate.zendesk.com)

**Trust: a happy and loyal team is not as hard as you think**  
AYALA LEVINE

**"Thank you." What to do with negative customer feedback**  
DAVE DYSON

**"Tell me your story"—communicating with remote employees**  
SUZANNE BARNECUT

Customers.  
Colleagues.  
Community.  
It's complicated.

*Relate*  
by zendesk

Life is made up of relationships. But relationships are complicated.

Relate is here to help you ponder, explore, and hopefully improve your important relationships. From coworkers to customers, bosses to best friends, everything except romance. That's on you.

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